

# OBJECT MODEL FOR DECISION AND ISSUE TRACKING

## Field of the Invention

The present invention pertains generally to information management, and more particularly to a system and method for capturing, storing, and tracking issues and decisions made during the development of a product.

## Background of the Invention

Product development is assisted by computer based applications, including word processing and graphics tools, scheduling tools, and product data management tools, among others. The typical product development cycle begins with an idea for a product or an improvement to a product that addresses a need in the industry or provides a solution to a problem. From the product idea, alternative designs may be explored, and ultimately, a design is chosen, designed, and implemented. During the initial phases of the product development cycle, word processing, graphics, and scheduling tools are often used to capture information such as marketing analyses, projected development schedules, and descriptions and reasonings behind particular design choices. During the design phase, information related to the design, such as the design specifications and 3-D model data, are typically captured using a CAD tool. During production of the product, part-tracking information is typically captured using a Product Data Management (PDM) tool. During every phase of the product development cycle, issues and decisions are made.

While it is clear that various computer-based tools assist in capturing information and tracking the progress of a product, the current state of the art remains problematic. First, no tool currently exists for specifically capturing and tracking idea questions, answers, and decisions associated with all phases of the product development cycle. Exploration of ideas is often a situation where many questions and issues are presented, and resulting answers or solutions are presented, and often ultimately resulting in decisions. In order to successfully track such exploration, it is necessary to capture many only partially completed information structures, including questions raised, proposals for solutions, answers to the questions,



### Summary of the Invention

The present invention is a system and method for capturing, storing, and tracking decision/issue information in a tool neutral persistent form which allows access to the data by any tool via a publicly defined interface.

5 The invention captures the clear incremental build-up of information leading to decisions, including issues, questions, and answers explored during the product development process.

The present invention preferably includes a Decision Tracking object model which captures and stores various object models containing articles of information and their associated relationships in an object model database. Each object model includes information and relationships that are accessible via a publicly defined interface. In one embodiment, when an object model is saved to the object model database, various types of articles of information contained in the object model, along with their relationships to other articles of information, are saved in separate relational database files associated with the articles of information. Applications accessing the object model database merely use the defined object model interface, which results in the automatic separation and storage of data type objects in a tool neutral persistent form.

20 The Decision Tracking object model interface allows the capturing of separate question, answer, issue, and decision objects. It also provides an hierarchical structure which may associate questions with other objects to reflect the fact that one question often leads to multiple follow-on questions with associated answers.

25 The invention also facilitates sophisticated queries on the object models to extract interesting information from the totality of stored information. The invention is advantageous for many reasons, including the ability for multiple people with different roles to access and extract the information in ways that are meaningful to their role.

### Brief Description of the Drawings

The invention will be better understood from a reading of the following detailed description taken in conjunction with the drawing in which like reference designators are used to designate like elements, and in which:

FIG. 1 is a conceptual object model diagram illustrating the separation of articles of information and their associated relationships to other articles of information;

FIG. 2 is a block diagram of Decision Tracking object model implemented in accordance with the invention;

FIG. 3 is a UML interface diagram illustrating a preferred embodiment of the Decision Tracking object model interface for the Decision Tracking object model shown in FIG. 2;

FIG. 4 is a block diagram of the persistent storage entities generated and maintained by the Decision Tracking object model of FIG. 2 using the interfaces defined in FIG. 3;

FIG. 5 is an illustrative example of a relational database file implementing a Decision table in accordance with the invention;

FIG. 6 is an illustrative example of a relational database file implementing a Question table in accordance with the invention;

FIG. 7 is an illustrative example of a relational database file implementing an Answer table in accordance with the invention;

FIG. 8 is a Question dialog for a graphical user interface implemented in accordance with the invention;

FIG. 9 is a Answer dialog for a graphical user interface implemented in accordance with the invention; and

FIG. 10 is a Decision dialog for a graphical user interface implemented in accordance with the invention.

#### Detailed Description

FIG. 1 is a conceptual block diagram illustrating the separation of articles of information and their associated relationships to other articles of

information, illustrating the accessibility of the information by various tools. In particular, a collection of object models 10a, 10b, 10c, 10d, 10e, 10f describing information and object relationships created by a variety of different tools 20a, 20b, 20c, ..., 20n during the development of a product are stored in a tool neutral form in persistent storage 30. Importantly, the object models 10a, 10b, 10c, 10d, 10e, 10f are not owned by any tool, including the tools 20a, 20b, 20c, ..., 20n that created them. Each object model 10a, 10b, 10c, 10d, 10e, 10f contains objects that have highly dependent object relationships.

The object models 10a, 10b, 10c, 10d, 10e, 10f each have a defined public interface that allows any tool 20a, 20b, 20c, ..., 20n that understands the interface definition to read and write legal data to the corresponding set of objects. Although it may be that only one application tool completely understands a single attribute (for example, a CAD tool that understands a 3D geometry and topology), the public interface definition allows virtually any tool to access parts of the object that it does understand, including its relationships with other objects. For example, the CAD tool 20a (e.g., SolidDesigner) creates data that is stored partly in the CAD Model object model 10a and partly in the Product Structure object model 10b. It is important to note that the CAD tool 20a is not required to change its internal data structure or user interface; rather the CAD tool 20a need only have capability to understand only those objects and structure that it reads and writes (which may be accomplished using an extension that allows import/export capability, techniques of which are well-known in the art). In this example, a Product Data Management (PDM) tool 20b (e.g., CoCreate Software, Inc.'s WorkManager) accesses the Product Structure model 10b and Design Alternative model 10c. Accordingly, the PDM tool 20b must have capability for handling changes made to the Product Structure model 10b made by the CAD tool 20a, and likewise, the CAD tool 20a must have the capability of handling changes made to the Product Structure model 10b by the PDM tool 20b. The common object model (i.e., Product Structure model 10b) that they understand thereby enhances the collaboration between the CAD tool 20a and PDM tool 20b.

It is also important to note that other tools (e.g., 20n) can also access the object models 10a, 10b, 10c, 10d, 10e, 10f at any time, and the collection of object models 10a, 10b, 10c, 10d, 10e, 10f, can be expanded at any time. Accordingly, the collection of information and relationships with other objects expands and evolves over the course of the product cycle, capturing the "as-designed" aspects of the product. In addition, the tool neutral persistent form of the object models allow both synchronous and asynchronous collaboration of the product development by allowing many different people (e.g., engineers, management, administrative personnel, and even customers) with appropriate permissions to access the data contained in the object models, which represents the current state of the product.

Among the object models in the object model database 30 is a Decision Tracking object model 10d, which encapsulates the information associated with tracking questions, answers, issues, and resulting decisions, and their relationships both to other objects in the Decision Tracking object model 10d and to objects in other object models 10a, 10b, 10c, 10d.

Objects in the Decision Tracking object model 10d may be created automatically by one or more tools 20a, 20b, 20c, ... 20n, or may be specifically created by users via specific Decision Tracking dialogs accessed via the user interface of the tools. In addition, a Decision Tracking tool 20c may be developed for specifically entering decision-tracking data. However, as noted above, no tool has ownership of the data in the Decision Tracking object model 10d, and any tool can access the data in the Decision Tracking object model 10d via publicly defined interfaces (discussed hereinafter) associated with the Decision Tracking object model 10d.

FIG. 2 is a block diagram illustrating a preferred embodiment 100 of the Decision Tracking object model 10d of FIG. 1, which provides an object model for capturing and storing the pieces and structure of information associated with making a design decision in a tool neutral persistent form.

As illustrated in FIG. 2, the major articles of information in the Decision Tracking object model 100 include the objects: Decision object 110, Question object 120, Design Issue object 130, and Answer object 140.

A Decision object 110 encapsulates a design decision about an aspect of a product. Various types of Decisions may be defined that are specific to a particular design aspect.

A Question object 120 encapsulates a question which may or may not be relevant to the formation of a design decision that is encapsulated by a Decision object 110.

A Design Issue object 130 encapsulates a design issue that may be addressed by posing questions and obtaining answers to those questions, which ultimately lead to a design decision.

An Answer object 140 encapsulates an answer to a question encapsulated in a Question object 120.

Within the Decision Tracking object model 100, there exist relationships between the objects, as illustrated by the connecting lines between the objects. For example, each Question object 120 may have associated with it only one Decision object 110, while a Decision object 110 may be determined by the answers to many questions (which are encapsulated in a plurality of Question objects 120). Each Answer object 140 may be associated with only one Question object 120.

FIG. 3 is a UML interface diagram illustrating a preferred embodiment of the Decision Tracking object model interface for the Decision Tracking object model 100 of FIG. 2. As illustrated in FIG. 3, the public interfaces defined for the Decision Tracking object model 200 of FIG. 2 include: Decision object 110, Question object 120, Design Issue object 130, and Answer object 140. The attributes for each interface are as displayed in FIG. 3.

In the Decision Tracking interface definition, information about a decision is encapsulated in a Decision object 110 (FIG. 2) accessed using the Decision 210 interface. In this embodiment, the Decision interface 210 may be extended to be specific to a certain type of design decision. In the illustrative embodiment, the Decision interface 210 is extended to provide a ProductRequirementDecision interface 212, a ProductFunctionDecision 214, a DesignAlternativeDecision 216, and a DesignRepresentationDecision interface 218. ProductRequirementDecision interface 212 is used specifically to capture decisions related to product requirements.

ProductFunctionDecision 214 is used specifically to capture the decisions related to a function of a product. DesignAlternativeDecision 216 is used specifically to capture decisions related to a particular design alternative of a product. DesignRepresentationDecision interface 218 is used specifically to capture decisions related to a particular representation of a product.

The Question interface 220 may also be extended to provide an interface DesignIssue 230 for encapsulating a design issue. As also illustrated, the Question interface 220 may also provide access to follow-on questions encapsulated in associated Question objects 120.

This ability to capture questions, associated answers, issues, and decisions, along with their relationship to one another allows a user or application to query the system asking important questions, and automatically receiving the feedback from the Decision Tracking object model. For example, the Decision Tracking object model may be queried for all questions, and their associated answers, that are associated with a particular decision. This type of query would allow an interested party to understand how a particular decision was reached. Alternatively, a particular design issue that was encountered in one product may be searched for and then all questions, associated answers, and associated decisions associated with the design issue retrieved to obtain a solution to the same problem that is encountered in a new product.

The interfaces defined in the UML diagram of FIG. 3 are preferably implemented in an object-oriented language such as C++ or Java2. The actual class implementation may vary from system to system, since it will often make sense to combine some of the interfaces into a single class for efficiency of implementation and/or performance.

FIG. 4 is a block diagram illustrating one embodiment of the persistent storage entities generated and maintained by the Decision Tracking object model 100 of FIG. 2 using the interfaces defined in FIG. 3. In this embodiment, each of the interfaces has associated with it a persistent storage file, preferably in the form of a relational database. The data encapsulated using each respective interface is stored in its respective relational database file. Accordingly, there is a separate relational database file for each defined interface. In the illustrative embodiment, a Decisions

table 310 stores all data accessed using the Decisions interface 210, Questions table 320 stores all data accessed using the Question interface 220, Design Issue table 330 stores all data accessed using the DesignIssue interface 230, Answers table 340 stores all data accessed using the Answer interface 240, and decision tables Product Requirement Decision table 312, Product Function Decision table 314, Design Alternative Decision table 316, and Design Representation Decision table 318 each respectively store all data accessed using the interfaces ProductRequirementDecision 212, ProductFunctionDecision 214, DesignAlternativeDecision 216, and DesignRepresentationDecision. The dashed lines connecting the various tables represents a foreign key (i.e., a common column in each connected relational database) used to represent relationships between data stored in the tables.

FIG. 5 is an illustrative example of a relational database file 410 implementing a Decision table 310. As illustrated, each column 502, 503, 504, and 505 maps to an attribute encapsulated by the Decision interface 210. Each row maps to a different Decision object 110. A Decision ID in column 501 is also associated with each decision and used as the primary key (which is unique across the Decisions table 410) for ease of searching.

FIG. 6 is an illustrative example of a relational database file 420 implementing a Questions table 320. Again, each column 602, 603, 604, 605, and 606 respectively maps to an attribute encapsulated by the Question interface 220 and each row maps to a different Question object 120. In this example, the primary key (i.e., a unique identifier across the file) for each Question object 120 is its Question ID (in this embodiment stored in column 602). The Decision ID of the Decision object that is associated with the Question is used as the foreign key; accordingly a foreign key column 601 is provided to store the Decision ID which maps respective Question objects to their associated Decision objects (if an association exists).

FIG. 7 is an illustrative example of a relational database file 440 implementing an Answers table 340. In this example, the Question ID attribute of the Question object that is associated with the Answer object 140 is used as the foreign key; accordingly a foreign key column 701 is provided

to store the Question ID to map respective Answer objects to their associated Question objects.

The other tables illustrated in FIG. 4 are implemented in relational databases files similar to those illustrated in FIGS. 5-7.

5       The methods by which certain decision tracking data is captured varies according to the type of data captured. Data may be captured when a user manually enters the data via a user interface dialog (for example, when a user enters a decision or question and associated answers using a Decision Tracking dialog in the application's user interface), or may be  
10       created automatically by an application (for example, attributes such as object identifiers, Date Answered or History may be automatically created or captured by the application at the time an article of information is captured or modified).

FIG. 8 is an example Question dialog 800 of a graphical user interface  
15       for a generic application that has the capability for accessing and creating a Decision Tracking object model 10d in accordance with the invention. As illustrated, the Question dialog 800 includes user capabilities to enter a question 802 and a name 804 for optionally entering a person or entity responsible for answering the question. The Question dialog 800 also  
20       includes user capabilities (i.e., buttons 806 and 808) for respectively entering an answer and/or decision relating to the question. In particular, if the user clicks on the Answer button 1006, an Answer dialog 1010, illustrated in FIG. 9, pops up. As illustrated in FIG. 9, the Answer dialog 1010 displays a frame 1014 containing the question to be answered (which is preferably not  
25       editable) and allows the user to enter an answer 1012 to the question displayed in frame 1014. Preferably, the answer dialog 1010 also allows the user to enter the name 1016 of the party answering the question.

User capability for entering a Decision to the answered question may be accessed by clicking on a Decision button 1018, which pops up a  
30       Decision dialog 1020, illustrated in FIG. 10. This same dialog is accessed by clicking on the Decision button 1008 of the Question dialog shown in FIG. 8. As illustrated in FIG. 10, the user may fill in a description 1022 of the decision and name 1024 of the party making the decision, and optionally a

decision reason 1026. Preferably, the underlying object code automatically generates a decision date and captures the decision in a history list.

Similar dialogs may be implemented to capture design-specific issues, product requirement decisions, product function decisions, design  
5 alternative decisions, and design representation decision.

As described in detail above, the invention provides a novel way of capturing, storing, accessing, and tracking questions, answers, issues, and decisions. The Decision Tracking object model of the invention allows the capture of the incremental build-up of decision exploration data including  
10 questions, answers, and decisions relating to product issues, alternative design proposals, product requirements, and product functions that are explored during the development of a product. The decision tracking information is represented in a form that may be accessed and presented in different ways using various computer-based applications.

Although the invention has been described in terms of the illustrative  
15 embodiments, it will be appreciated by those skilled in the art that various changes and modifications may be made to the illustrative embodiments without departing from the spirit or scope of the invention. It is intended that the scope of the invention not be limited in any way to the illustrative  
20 embodiment shown and described but that the invention be limited only by the claims appended hereto.